Overview

Workforce management is critical for customer service organizations that must balance operational efficiency and customer satisfaction. To effectively staff environments that handle voice, e-mail, Web chat, SMS, faxes and work tasks, as well as social media interactions, managers must base schedules on accurate forecasts of contact or task volume and staffing requirements. With accurate forecasting, organizations can match employee availability and skills to customer needs with precision.

Genesys Workforce Management (WFM) is a comprehensive, automated software application that accurately forecasts, schedules and tracks the performance of multi-skilled employees in single and multi-site front and back-office environments. It is the only integrated workforce management system to offer automatic updates of historical data and employee skill information in real time across all interaction channels to ensure the most accurate planning.

The Genesys WFM applications provide everything you need to effectively plan and manage staffing. The software includes: workload forecasting; flexible scheduling and planning options; performance monitoring; employee real-time adherence; historical reporting; employee empowerment; and an out-of-the box API for easy integration to third-party contact center and back- and front-office applications.

In addition, Genesys Training Manager, when coupled with Genesys WFM, can help improve employee performance through better scheduling and tracking of training, which will lead to increased agent engagement and thus greater customer satisfaction.
Highlights:

- Uses multiple algorithms based on actual trends across voice, e-mail, chat, text, social media and work items to accurately forecast and schedule workforce needs.
- Links schedules with development plans, skills, routing strategies and training.
- Integrates seamlessly with other Genesys applications to ensure that historical data and employee skill information are updated in real time across all channels.
- Enables schedulers to develop strategies based on skills- and task-based scheduling and shift preferences.
- Intra-day monitoring capability and graphical comparisons help to easily make adjustments where needed.
- Provides real-time adherence tools to understand what employees are doing.
- Supplies comprehensive reporting tools and templates for a variety of time periods and organizational levels.
- Delivers employee empowerment tools that allow individuals to request time off, make trades, as well as schedule preferences for shifts, for example.

Unique Planning and Adherence Capabilities

Most environments maintain separate systems for routing interactions and tasks and for workforce management. This means that updates to employee skills, and making employees available who can handle work items or other media channels, must first be made in the contact routing system, and then manually updated in the workforce management system.

The unique Genesys Suite architecture, on the other hand, seamlessly integrates the Genesys platform and the Genesys WFM software so that updates to historical data and employee skills across all contact types and locations are automatically synchronized in real time. This gives planners the highest level of accuracy and eliminates the costly and time-consuming process of manually updating employee skill-set changes. What's more, Genesys Workforce Routing ensures that routing decisions are based on an employee's future schedule state to prevent any adherence problems. For example, planners can create routing strategies that only route work or interactions to employees who are actually scheduled to handle that activity at that time, or strategies that do not route work or an interaction to an employee who is changing to an off-line state within the next five minutes.

Forecast with Confidence

Genesys WFM automatically collects historical volumes and average handle time for any interaction or work times, and allows for work to be categorized as activities. Each activity can have its own unique qualities and requirements, such as the requisite employee skills and skill levels needed in order to schedule an employee to perform this activity; unique statistical calculations for historical data collection; open and close hours specific to each day of the work; and prioritization parameters allowing it to be ranked in importance against other activities.

The software can easily generate optimal forecasts in a multi-skill environment, and account for the efficiency gain inherent in environments where employees can perform multiple types of work. It can also predict staffing requirements across multiple sites, accounting for details such as time zones, employee hire/termination dates, and employee availability based on work contract and pre-planned obligations.
Activities can be figured into three categories that directly affect how the staffing requirements for that activity are calculated:

- Immediate Activities: Such as voice calls, text chats and SMS/IM messaging where the customer is actively waiting to be helped. These activities usually have service level goals calculated and expressed in terms of a percentage in so many seconds.
- Deferred Activities: Such as e-mails, faxes, work-item tasks and physical document handling where the customer has submitted the interaction and has moved on to something else. These activities usually have service level goals calculated and expressed in terms of 100 percent in so many hours or days.
- Fixed-Staff Work Activities: These are usually activities where little-to-no forecasting calculations are performed. These types of activities would include job functions like mailroom clerk, front-desk receptionist and optical-scanner operator. Genesys WFM allows you to easily define a staffing requirement unique to each interval of the day.

Multiple forecast “scenarios” can be built for the same time range and activities using different forecasting parameters. These forecast scenarios can be anywhere from one day to two years in length, and be generated for any time period into the past or future.

They also allow for staffing requirements to be forecasted through the application of agent-behavior and reality-factors, as well as specific business goals, via a user-friendly forecasting wizard. In addition, templates are available to define a unique value for every interval of every day of the week for your forecasting process.

Optimize Schedules

Genesys WFM is designed to be able to provide advanced schedule optimization, even in the most complicated union or governmentally-regulated workforce environments. The application supports fixed, rotating and flex schedules, employee preferences, and team schedule synchronization. And, when assigning schedules, various schedule constraints can be applied that take into account work rules, conditions, contractual requirements, skills, skill proficiency and employee rank.

Prior to publishing a master schedule, multiple scheduling scenarios can be created. Scenarios can be based on actual employees or employee profiles. Employee profiles allow users to view an optimal mix of shifts in a schedule based on theoretical employees. Profiles can also be used to build a hypothetical team model based on numerous “what if” scenarios to address over-/under-staffing. Schedules are graphically displayed and color-coded to reflect activity types, and they can be modified via a drop-down menu selection.

Schedules can easily be re-optimized in real time for part of the day, which allows for real-time adjustments to current schedules as a result of new, unexpected staffing needs. These re-optimizations can be flexibly done for a single employee, group of employees or entire sites. Genesys WFM not only allows you to view and manage all employee schedules for a given day, but you can also view and work with a single employee’s schedule for multiple days on one screen.

TOP MEXICAN TELECOMMUNICATIONS COMPANY CHOOSES GENESYS WORKFORCE MANAGEMENT TO REALIZE BOTTOM LINE COST SAVINGS

- The largest and fastest growing private telecommunications company in Mexico provides Internet and telephone services to over 648,000 home and business customers in 20 cities across the country, and has recently taken new steps to expand its position in the market. The company sought new technology initiatives to allow them to offer customers improved services, and the success of these initiatives largely depended on the contact center. They wanted to use Genesys to transform their two disparate contact centers from simple customer touch points to mature virtualized installations that cut costs and support business expansion.

- The two physical sites, a near tripling of inbound call volume, and marketing of new Internet services all demanded that the company make more efficient use of its contact center employees — who are the company’s sales and customer service force, but who also represent a significant cost, so the company must use their time wisely. With the company’s investment in Genesys Workforce Management (WFM), they can now predict spikes and lulls in customer contacts and can schedule employees accordingly, which helps to avoid under- or overstaffing and results in a considerable cost savings. In fact, the company calculates that Genesys Workforce Management will deliver savings of $1.6 million in the first year alone, thus paying for itself in just 64 days.

- Genesys WFM has performed its function well, and staff forecast deviations have not exceeded four percent. WFM has confirmed the company’s suspicions that it had been overstaffing its contact center, and now the company can correct its errors, reap the savings and still manage 37,000 inbound calls and 19,000 outbound calls per day. The bottom line is that the Genesys Workforce Management solution saves the company millions of dollars annually, provides multimedia contacts, manages multiple sites as a single virtual center, and scales easily to accommodate future growth.
LEADING U.S. HEALTHCARE SERVICES PROVIDER CREATES A CONSISTENT CUSTOMER EXPERIENCE WITH GENESYS

• Throughout its history, this leading non-profit healthcare service provider has added new locations — including several hospitals and dozens of clinics — and enhanced existing facilities to better serve its nearly one million customers. The organization’s goal was to create a consistent customer experience across the enterprise, yet there were many challenges. The organization faced costly performance penalties when contractual service levels in the contact centers could not be maintained and, in addition, they had no centralized workforce management system in place to optimize their distributed employee resources.

• Before Genesys, customer service managers at company headquarters could not obtain basic information or metrics on employee efficiency, average call handling times or schedule adherence. Now, thanks to the organization’s customer service redesign and the implementation of Genesys Workforce Management (WFM), they enjoy very robust scheduling, reporting and analytical capabilities that have helped balance operational efficiency and customer satisfaction.

• Today, employees are able to adjust their own schedules, including shift preferences and time off, which has resulted in average schedule adherence of 93 percent. The combined impact of the organization’s contact center redesign efforts and technology implementations have helped reduce costs across the organization. For instance, overall efficiency improvements have enabled them to save 12 full-time positions through normal attrition, providing a savings of $455,000 in one year alone.

Monitor Employee Performance
Intra-day schedule views allow managers and supervisors to easily see what employees should be doing at any particular time. It makes it easy to view comparisons between forecasted data, scheduled data and actual data. Configurable color options within the views make it easy for managers to identify items such as meals, breaks, activity sets and exceptions. Managers can view information at different intra-day or weekly granularities to help them understand how well they are meeting planned objectives.

Views can be configured with visual alarms that will automatically activate when the variance between the expected values and actual values breaches a specified threshold. These alerts can be uniquely specified for every activity. The view allows for all of the trending data to be displayed in its local time zone, or in the local time zone of the user.

Effectively Train Your People
As the number of customer channels grows, so does the need to train employees and give them the skills necessary to manage each channel. But training plans are often created using manual processes that can result in cancelled classes, poor tracking of “no shows,” and uneven development of employee talent.

Genesys Training Manager, when coupled with Genesys WFM, can help improve employee performance through better scheduling and tracking of training, which will lead to increased agent engagement and thus greater customer satisfaction. Genesys Training Manager can automatically build, schedule and manage multiple employee training plans in Genesys WFM. Each training plan can automatically schedule different types and amounts of training for individual agents based on service level impact, plus agent, trainer and training room availability. Further, it provides employees, trainers, team leaders, supervisors and training teams with an online view of the training scheduled in Workforce Management. Plus, trainers can see who attended training, and any agents who missed training can automatically be re scheduled in Genesys WFM.

• Genesys Training Manager allows you to: Automatically plan, schedule and manage training in Genesys Workforce Management — taking into account service level impact and employee, trainer and training room availability

• Schedule Training events and format for training — such as classroom, e-learning or coaching sessions in Genesys WFM, including an optional trainer and training room diary management system Genesys Workforce Management Alcatel-Lucent Enterprise Business Solution Brochure 7

• Track each training plan so that the training team, planners, schedulers and the business can view progress of all business-wide training
• Provide agents, trainers, team leaders and training teams with an online view of the training scheduled in Workforce Management — trainers can also register which employees attended training, and missing agents can be automatically re-scheduled in Genesys WFM
• Implement a successful Workforce Optimization strategy across your organization

Real-Time Adherence
The real-time adherence capability allows managers and supervisors to monitor employee service-level compliance, and to easily identify and track actual employee status against planned schedules. Visual alerts enable them to respond quickly if variances exceed specified levels.

True real-time adherence monitoring can be performed for any activity being forecast and scheduled by the application. For example, it allows for the definition of an adherence severity threshold, and any employees who are out of adherence past this threshold can be categorized, filtered and displayed differently, and it can also differentiate between those employees who are just recently out of adherence and those that have been out of adherence much longer.

Leverage Comprehensive Reporting Tools
Genesys WFM provides a wide selection of reports for configuration, planning, forecasting and workforce performance and adherence, and for a variety of time periods and organizational levels. It comes with over 35 out-of-the-box report templates, and reports can be displayed through the user’s Web browser, printed, and exported to several file formats. With a flexible wizard process, many different reports and unique report formats can be displayed from a single report. In addition, reports can be flexibly scheduled to be generated overnight, or at any other time period, so that the reports are ready to be viewed and analyzed in a timely manner.

Employee Empowerment Functionality
The employee Web interface enables employees to conveniently and flexibly view and manage their own schedules. This includes managing and inserting exceptions directly into their scheduling; viewing the schedules for other employees; initiating, negotiating and confirming schedule trade proposals with other employees; defining schedule preferences by date; managing their own time off; and participating in pre-generated schedule bids:

Access Tools Easily
The Workforce Management Integration Application Programming Interface (API) provides standards-based access to data such as adherence statistics, schedule details and forecasts. Managers and supervisors can use this data to monitor and manage employee performance, calculate payroll and import employee schedule exceptions from third-party applications such as HR systems or e-learning systems. Mobile Telecommunications Company Implements
GENESYS TO IMPROVE CUSTOMER SERVICE LEVELS AND STAFF SATISFACTION

• This leading eastern European mobile telecommunications company services around 3.9 million customers, and has negotiated roaming partner deals with over 300 operators in 126 countries. The competitive nature of the local telecommunications market means that the level of service offered to customers can be a key differentiator.

• As the Vice President of Customer Service Development explains, “Our primary aim is to become number one in the market in terms of customer service. Each employee deals with more customers now and we haven’t recruited more staff. In fact, the average number of employees has gone from over 380 to fewer than 360, even though customer numbers have risen from 3.1 to 3.9 million. Now, thanks to Genesys, we can assign the right priority to a call and we have the ability to get the customer to the right employee, in the shortest possible time. That means that customers benefit in terms of the speed-of-answer and also the level of knowledge displayed by the employee dealing with the call. We can now more clearly define the skill groups and more easily route the customers.”

• “Genesys Workforce Management definitely gives us better control of the scheduling and day-to-day running of the contact centers,” says the Vice President of Customer Service Development. “As a result, employee efficiency has gone up 7.5 percent — from nearly 78 percent to over 85 percent — and we’ve been able to save some internal resources through our planning. We did no predictions at all before and only used historical data, so we’re much better informed now. What’s more, the general level of customer service has improved. Each employee is answering 21 percent more calls every month, on average, and first call resolution stands at 95 percent. We wanted to improve the contact center environment and service and, as a result, the customer satisfaction levels, and we’ve done all that. And the employees are happier too. They now have all the customer and call data available online, whereas before they had no indication of the customer history available to them. Thanks to Genesys, we now have uniform, integrated systems and processes managing and tracking customer activities across multiple channels. With Genesys in place, we now take a more global approach and we’re able to design new strategies and improve service levels and quality in order to achieve our goals.”

About Genesys
Genesys is a leading provider of multi-channel customer experience and contact center solutions. With over 3,500 customers in 80 countries, Genesys orchestrates more than 100 million customer interactions every day across the contact center and back office. Genesys helps customers power optimal customer experiences that deliver consistent, seamless and personalized experiences across all touchpoints, channels and interactions.

For more information visit: www.genesys.com, or call +1 888 GENESYS.

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